



Improving lives THROUGH
supports and services
THAT FOSTER self-determination.

ACTION PLANNING 101

April 19, 2016

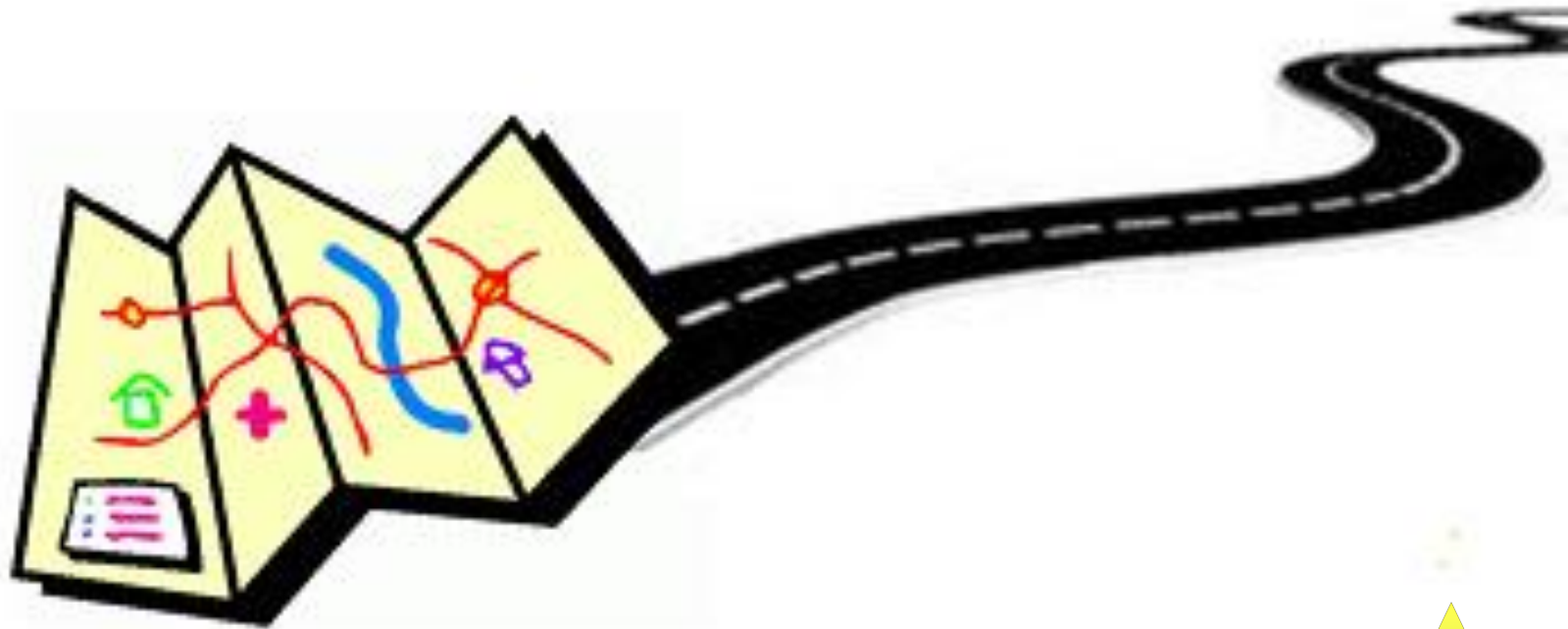
Pam Shannon and Amber Stockreef



Agency Tiered Support Action Plan



A roadmap to where you (agency team) are going.



"Would you tell me, please, which way I ought to go from here?"

"That depends a good deal on where you want to get to," said the Cat.

"I don't much care where--" said Alice.

"Then it doesn't matter which way you go," said the Cat.

"--so long as I get SOMEWHERE," Alice added as an explanation.

"Oh, you're sure to do that," said the Cat, "if you only walk long enough."

--From Alice in Wonderland by Lewis Carroll

Which way from here?

1. As an agency team:

- A. Choose a recorder and a reporter
- B. Determine your starting location.
- C. Choose a destination.

2. On chart paper record the following:

- A. Starting point
- B. Ending point.
- C. Roads taken.

3. Be prepared to share how decisions were made.



Agency Tiered Support Team Process



- 👤 Data Based Decision Making Process
- 👤 Problem Solving Process
- 👤 Action Planning—Your Road Map



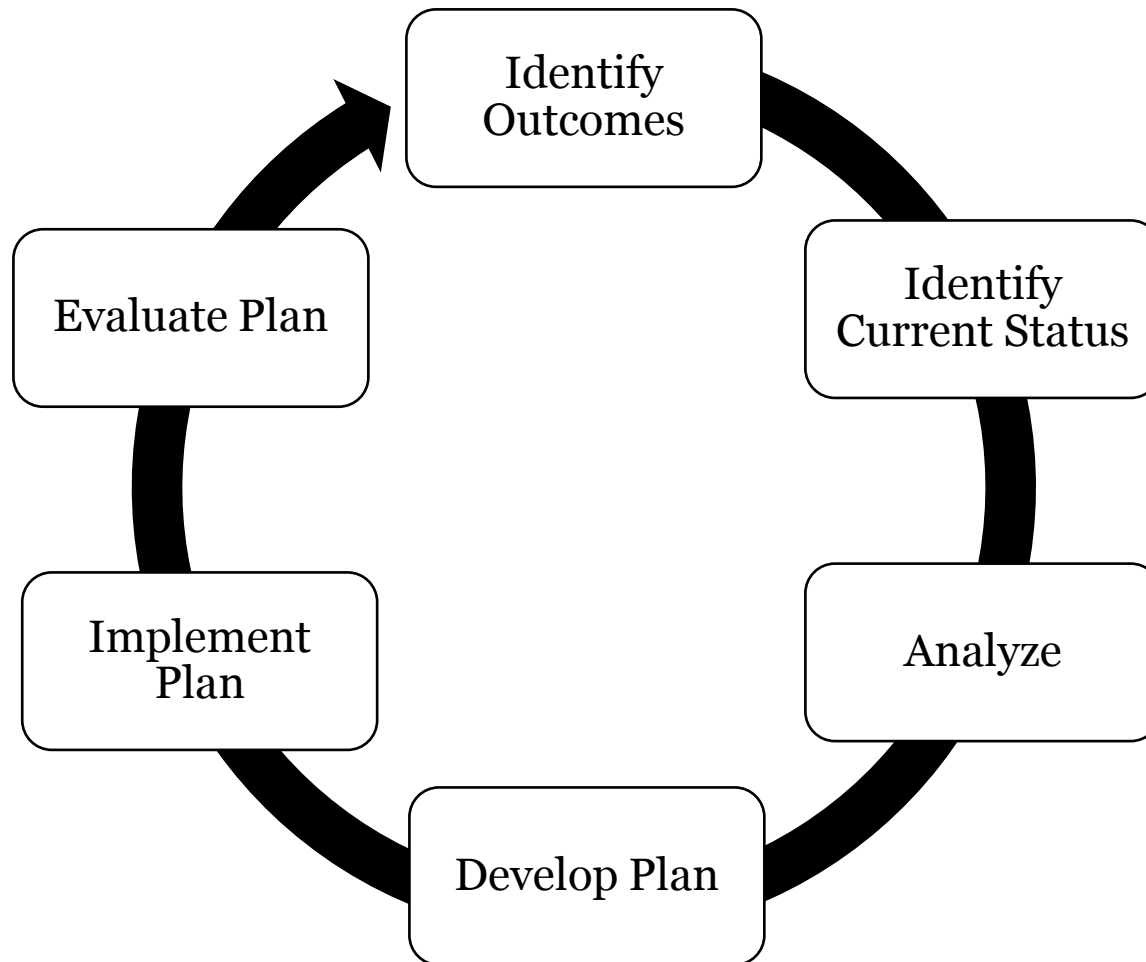
Action Plans



- 👤 Are a roadmap of where we are going
- 👤 Helps Your Agency Team keep Focused on
 - 👤 Goals, timelines,
 - 👤 The resources we need
 - 👤 Who is responsible
 - 👤 How you will know how you have done (evaluation)
- 👤 Regularly Review and Revise
- 👤 Refer to When Creating Your Meeting Agenda

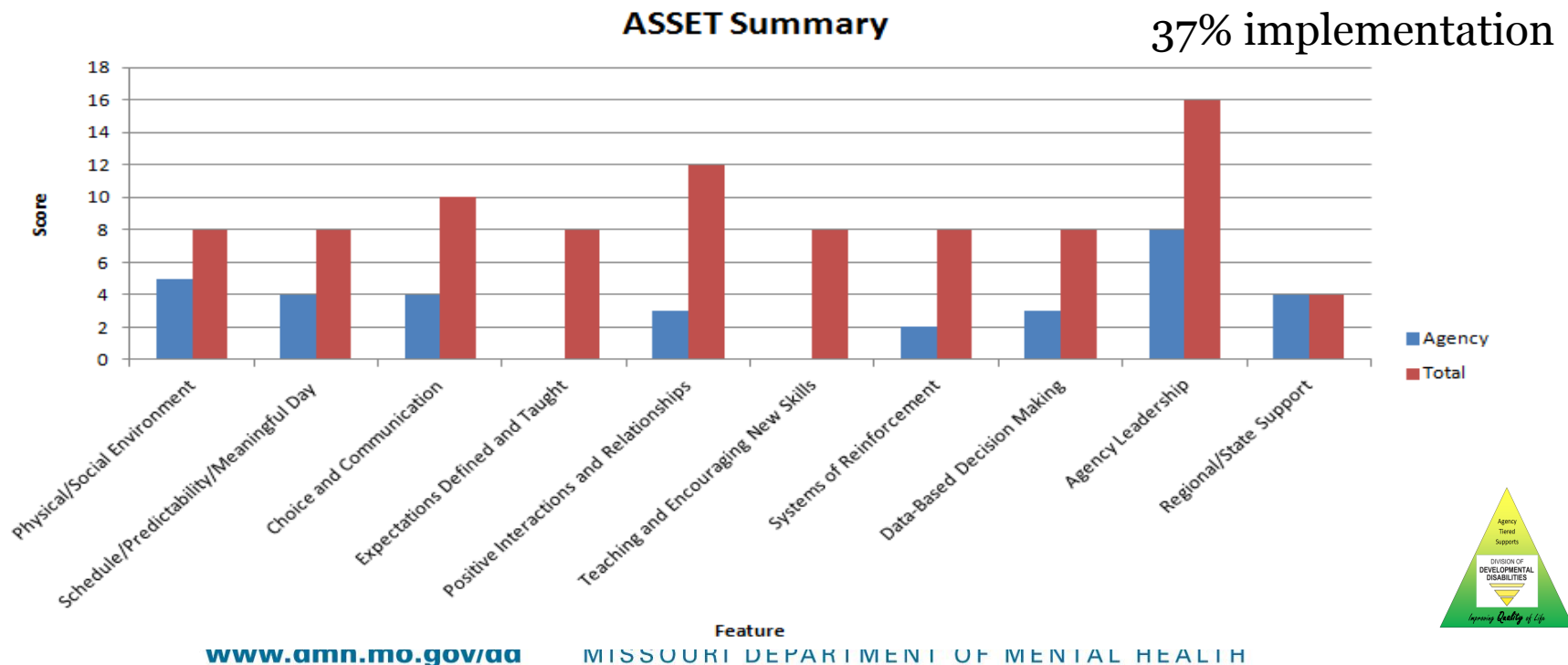


Decision Making Process



Action Planning

1. Identify Outcome
2. Review data for each component to assess your current reality



Action Planning

3. Analyze the problem

What is your “reality gap”?

What is the gap between what you desire and what the current reality is?



Action Planning



4. Develop a Plan:

A. Brainstorm and List:

1. Possible Goals,
2. Possible Action Steps, Timeline and Resources and
3. Artifacts and Documents for the Evaluation/Outcomes Section

B. Prioritize Goals for Team Action Plan

- From Brainstorming - agree on Goals, Action Steps, Timeline and Resources, Who is Responsible and Evaluation Measure/ Evidence

C. Complete Action Plan



Example Action Plan



AGENCY TIERED SUPPORTS ACTION PLAN

AGENCY TEAM: ABC Agency Team

Agency Coach: Mike Matheny

Date of Plan and Revision Dates:
8/14/12; 10/16/13; 9/25/14

Overall Objective/Mission of Specialized Support Services Tiered Supports: Establish a system that improves quality of life by promoting a healthy, consistent environment for individuals being supported, as well as those employed by the agency.

Goals designed to meet this objective:

1. Establish an agency team
2. Establish clear expectations for individuals supported by the agency and employed staff
3. Teach values/expectations to individuals supported by the agency and employed staff
4. Develop universal strategies for improving quality of life
5. Reduce staff turnover
6. Develop an internal data system.
7. Increase staff sensitivity to consumer respect

IMPLEMENTATION

EVALUATION

What Needs to be Done?

Person Responsible

By When?

Status/Date Completed

What Evidence Indicates this Progress

How and When Will Evidence Be Gathered?

Action Steps for Objective 1: Establish an agency Team

1. Recruit staff for the agency team	Mike Matheny		Completed	Agency team is actively meeting	
2. Assign roles to agency team members	Mike Matheny & A-Team		Completed	Agenda/Meeting Notes are available	Organized Binder with all meetings notes
3. Schedule agency team meetings for 6 months to 1 year			Completed		
• Administrator attends at least 80% of meetings	Mike Matheny		Completed		
• Team meetings occur consistently	Mike Matheny & A-Team		Completed		
4. Establish a clear mission/purpose	Mike Matheny & A-Team	10-31-14			
5. Working on "process" due to staff participation changes.	Mike Matheny and Dave Duncan	February Meeting		Written process showing how agency team will function.	

Example Action Plan Cont'd

Action Steps for Goal 2: Develop universal strategies for improving quality of life

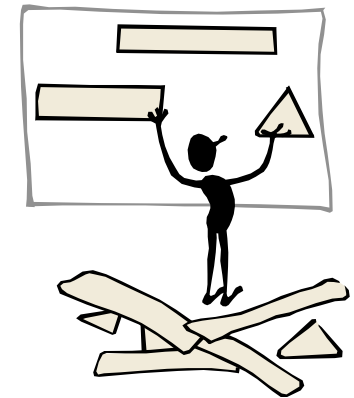
1. Agency administrators attend Tools of Choice Training	Agency Administrators		On-Going		
2. All employees attend Tools of Choice Training	Dave Duncan/Support Staff		In-Process/On-Going		
3. Establish coach for on-going monitoring of Tools of choice implementation	QDDP				
4. Create method for documenting completion of Tools of Choice training and on-going monitoring	Mike Matheny and Dave Duncan				
- Attend Tools Coaching Training	Dave Duncan	February 2015		Dave is trained to competency as an agency coach	

Action Steps for Goal 3: Reduce staff turnover

1. Create a staff survey to determine where more training is needed and what is reinforcing to staff.					
2. Create a Lead Staff Training			Completed		
3. Create a Direct Support Staff Training	Lead Staff				
4. Schedule Lead Meetings	Mike Matheny	9/2013	On-Going		

Changing the Action Plan

- 👤 The action plan is a guide, a living document.
- 👤 It is okay to change the plan.
- 👤 Make sure the team understands:
 - 🧑 What is causing changes to be made
 - 🧑 Why the changes should be made
 - 🧑 The changes to make (goals, steps, resources).
- 👤 Team must be in agreement.
- 👤 Update the action plan to reflect the changes.
 - 🧑 Put revision date
- 👤 Keep a copy of old action plan for records.



Monitoring and Evaluating the Action Plan



- 👤 Just as important as identifying the goals and action steps.
- 👤 Ensures that the agency/team is following the established direction.
- 👤 How often?
 - 👤 At least quarterly
 - 👤 If rapid change occurring inside/outside agency then may want to monitor/evaluate monthly.



Celebration

- 👤 When a goal or step is completed, acknowledge that success.
- 👤 Can get too eager to focus on moving to the next step without pausing.
- 👤 Taking time to acknowledge a job well done provides closure, fulfillment and prevents the next planning cycle from being a grind.



Table Talk

Where is your team in the action planning process?



Let's Practice

- 👤 Consider a practice you would like to see more of (who do you want to do what)
- 👤 What is your current status of this right now. (make an educated guess).
- 👤 Identify what needs to change
- 👤 How are you going to teach it/coach it/recognize it?
- 👤 How are you going to know what you are doing (teaching, coaching, recognizing) is effective?
- 👤 Write an action plan goal using the action plan template.

Review
Often

Conclusion



- 👤 Use data to create your agency leadership team action plan
- 👤 Make it specific
- 👤 Review and revise it often



Keep the Action Plan Off the Shelf!

"The question is whether the strategic plan [action plan] will be pursued or end up on a shelf collecting dust, beside other well-intentioned initiatives."



📰 "Strategic Plan Attacks School Inadequacies", Hartford Courant, July 13, 1994

Thank You!!



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